

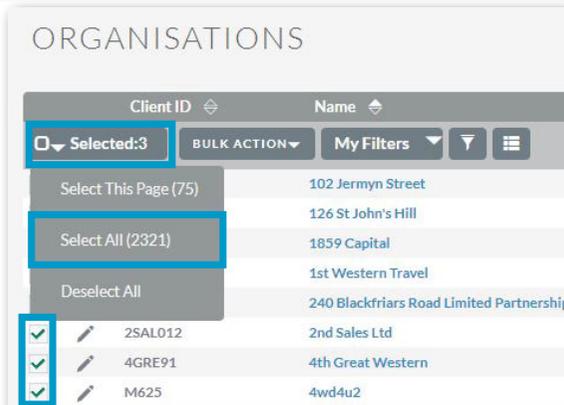
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Bulk Update Records

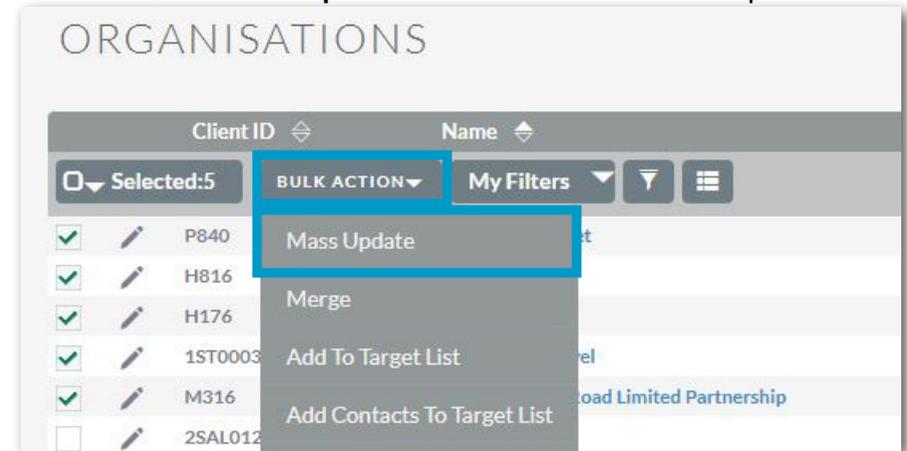
1. Bulk updating records can be really handy – if a colleague is leaving your firm, you can mass update all of their clients and assign them to another colleague/user. To **Bulk Update** navigate to the module where the records you are updating are and use the **Search Filter** to find the records you wish to update. For this example we'll be using the Organisations module.



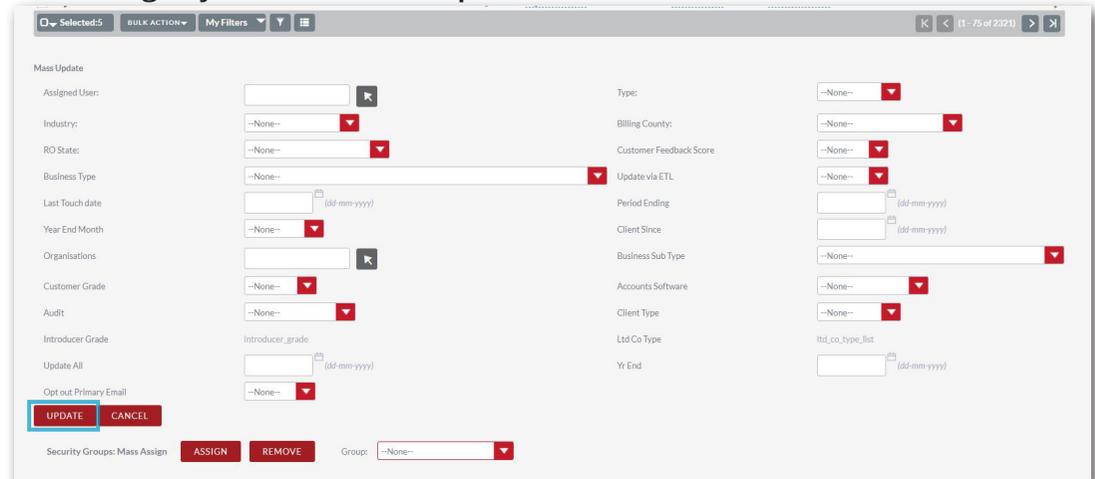
2. Once you've found the records. Use the **check boxes** on the left hand side to select. Or use the drop down arrow box to **Select All**.



3. Once selected select **Mass Update** in the **Bulk Action** drop down menu.



4. Scroll down the selected records page to find the **Mass Update** form below. Here you can make your updates such as changing the **Assigned User, Customer Grade or Client Type**. Once you've made all the changes you wish select **Update**.



5. A pop up box will then appear select **OK** to confirm the updates on the records. Once done the records will be updated.

